

How to create and confirm an order for a Prepaid Account in Online Business Account (OBA)

With Online Business Account, creating an order is easy to do:

1. Select the correct mailing option to reflect whether you are posting on your own Royal Mail account or on a clients account.
2. Select the posting location from which you are posting from.
3. Select which account you wish to place an order on.
4. Select "Create a New Order".
5. Complete the Order by filling in the relevant fields.
6. **Save** your order when all product details for that day have been entered
7. **Contact the Prepaid Team** for them to confirm the Sales Order.
8. **Search for the order** when the Prepaid Team have advised that the Sales Order is confirmed
9. **Print** your confirmed order and handover with your mail.

When you log into OBA, you should have access to the following tabs:

- Orders
- Invoices
- Reporting



You create a Sales Order as per normal OBA processes. If you need help and guidance with this, take a look at the [OBA Help Centre](#).

When you have completed the order, you click on the 'Confirm Order' button. However, as you are a Prepaid Account customer, the order will only Save, it will not Confirm and you do not at this point, have the option to print your Sales Order, which is required to accompany your mail.

Item	Product	Quantity	Description	Surcharge	Net Price	VAT	Total Price
10	STL	10	1ST AND 2ND CLASS ACCOUNT MAIL	0.00 GBP	81.98 GBP	12.79 GBP	78.79 GBP
	Insert product code						
	Product Search						
	Insert product code						
	Product Search						
	Insert product code						
	Product Search						
	Insert product code						
	Product Search						
	Insert product code						
	Product Search						

5 items items | Cancel order | Update order | Save order | Confirm order

Once the you click on 'Confirm order' a message is presented that advises that your Sales Order has been saved only

You need to make a note of the Sales Order number and you must then contact the Prepaid Accounts Team and advise them of the Sales Order number you have saved.

NB: Please note that Email is the preferred contact method.

The Prepaid Team email address is prepaid.accounts@royalmail.com

The Prepaid Team will check your account details and if these are ok, the team will confirm the order on behalf of you

Once the Prepaid Team have advised you that the order is confirmed, you need to print your confirmed Sales Order. To do this, go to the Orders tab in OBA and in the 'Manage your orders' screen, click on 'Create a new sales order summary'

Saved Order

Thank you for saving the order, your order number is 5056369445.

This order has only been saved in the system and has not been confirmed. Please ensure you confirm the order later today if you are sending items into Royal Mail. If you are having problems confirming this order, for help please look at the 'How to create an order' online video at www.royalmail.com/obavideos

Close 0

Manage your orders for Account: 00697

Create a new transaction, for example an order. I

Call one of your existing transactions. To do so,

What would you like to do?

- ❖ Create new Order
- ❖ Create new order using an existing template
- ❖ Create a new Order Template
- ❖ Switch account
- ❖ Download Despatch Document
 - PDF Version
 - Excel Version
- ❖ Delete sales Order
- ❖ Create a new sales order summary
- ❖ Reprint last sales order summary

This will open a new window showing the order details.

You must then print the ‘Sales Order Summary’ using your browsers toolbar.

If no data appears in the Sales Order Summary, close it down and try again.

OBA Sales Order Summary

From 27-Apr-2016 09:54:13 to 28-Apr-2016 14:43:29

Posting Location: 900027150 DEMO CUSTOMER

Poster Address : ROOM 8F20 FIRST FLOOR B BLOCK

Post Code :549 1HQ



Posting date	Sales Order	Your Reference/Worklet Id	Service	Items	Directs	Residuals	Ave Weight	Total Weight	Surcharge	Net Price	VAT	Gross Price	VAT Code
Account: 905716000 DEMO CUSTOMER				PR1	PH1245								

NB: You must not post without a Sales Order and must not use the Reprint option that is on the main Order screen as there is no barcode on a reprint and using a Reprint could lead to your mailing being refused or delayed.

The Sales Order is then invoiced in the usual way, with the invoice being sent to you for reference only and the monies taken from your account balance